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THE MAGAZINE OF THE SOCIETY FOR TECHNICAL COMMUNICATION

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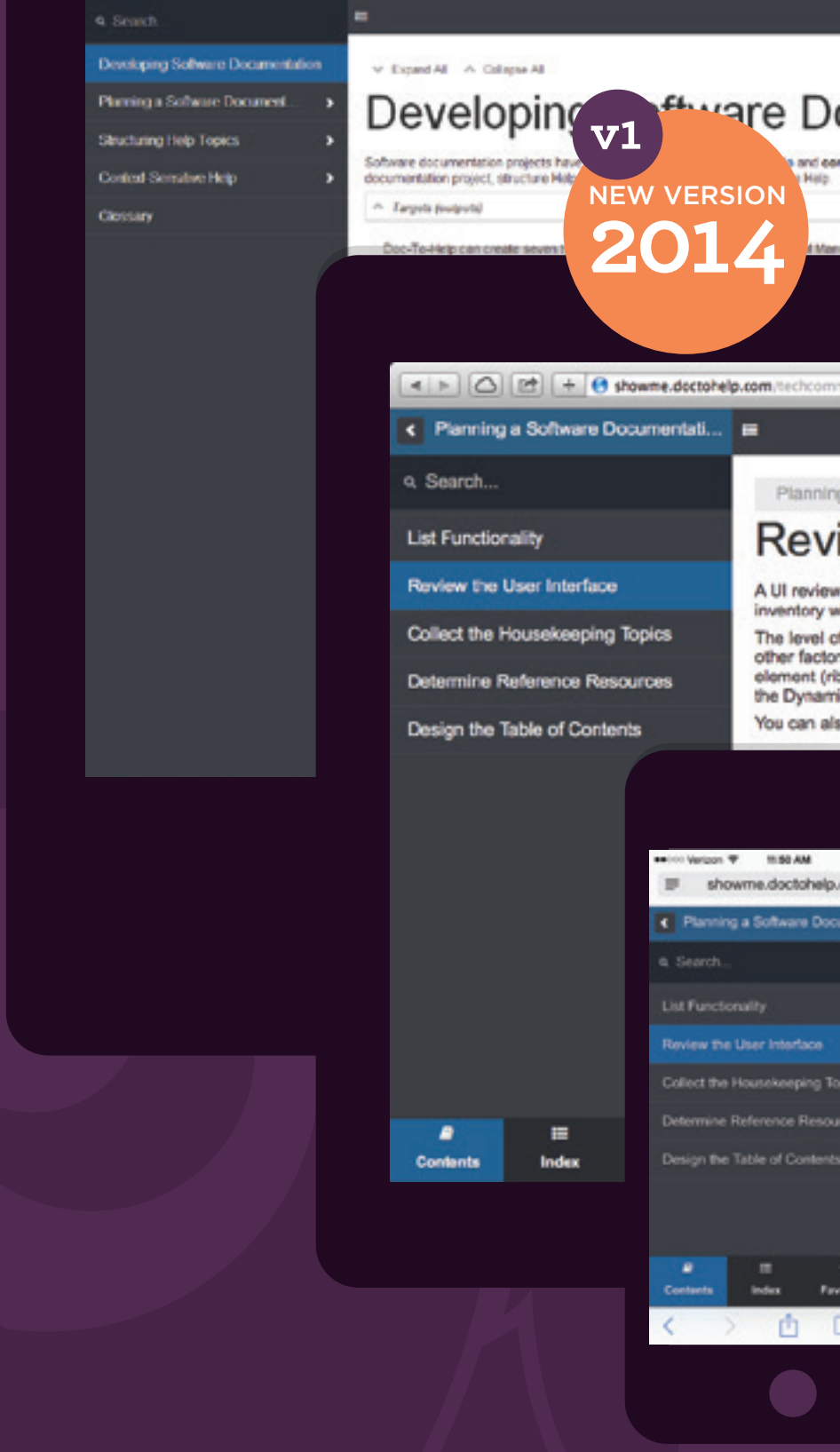

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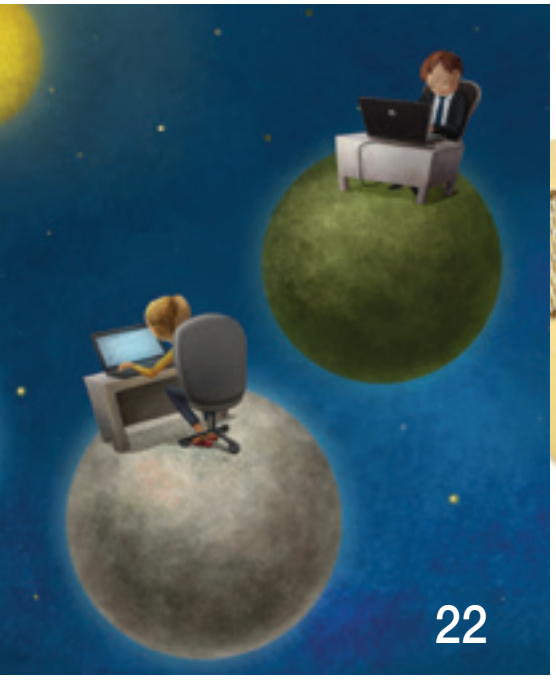

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A Note from the Editor

HAVE YOU EVER worked on a technical communication project that needed help? The October issue of *Intercom* focuses on solving communications problems in the workplace and in "rescuing" troubled projects and teams.

Heather Meeker Green and Rachel DiGiammarino from Accordence Inc., a consulting firm specializing in negotiation, communication, and personal effectiveness skills, have provided an article with their recommendations for driving a successful project—"'Project Rescue:' A Mindset for Collaboration." They suggest three essential practices for creating collaborative environments in the workplace—leveraging interests, broadening perspectives, and de-escalating tensions. They claim this strategic approach ignites collaboration and results in effective rescues.

Tom Mochal of TenStep Inc. is an instructor and consultant on people and project management. His article for *Intercom*, "Minimize the Risk Associated with Project Rescue," explains that project rescue is not an attempt to repair a sinking ship, but an attempt to raise a project up from underwater, and therefore is a radical and difficult task. He outlines several methods for minimizing the risk of troubled projects: 1) isolation (isolate the work into a separate recovery project with agreement from the project sponsor or manager); 2) assessment (assess the troubled project to determine what went wrong and why); 3) alternatives (develop alternatives, which may include canceling the project); and 4) implementation (activate, measure, and monitor the recovery plan).

In "Getting Out of Debt: Avoiding Bankrupt Technical Communication," Raymond Gillespie uses a debt metaphor to show how complex projects like a documentation set can become troubled by knowledge gaps. He provides several recommendations for how to get out of debt through "refactoring" techniques—studying, understanding, and restructuring—such as getting to know the software testers and customer support and software maintenance teams, and using topic-based writing techniques.

In less obvious ways, the rest of this month's *Intercom* also addresses project rescue. Technical Editor Maria Willacy addresses the longtime issue of rescuing content from subject matter experts (SMEs). She provides practical advice for technical writers collaborating effectively with SMEs and sharing dual ownership of a project. Dave Wright and Harry Calhoun from IBM discuss what it's like to work as writers with different backgrounds (marketing vs. technical writing) for a technology company. They address the strengths between marketing and technical writing, how to work past roadblocks, and what you need to know to be successful in a technical environment. And finally, technical writer Serena Beck shares her experience as part of a telework team. She details the inherent communication challenges, how to keep a work-life balance, how to stay productive and avoid distractions, and the cost benefits of telework.

On page 26, I've published the *Intercom* Editorial Calendar for 2015. Take a look and consider submitting an article!

Liz Pohland

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A Mindset for Collaboration

By HEATHER MEEKER GREEN and RACHEL DIGIAMMARINO

STUDIES BY STANFORD Research Institute and the Carnegie Mellon Foundation among Fortune 500 CEOs found that 75% of long-term job success depended on people skills and only 25% on technical skills. Add to that the reality that today's workforce is facing greater complexity and constant change in virtually all industries—aggressive competition, increased workload, challenges of communicating in a matrixed and global organization, rising economic pressures to be more efficient, and on and on.

In this VUCA (Volatile, Uncertain, Complex, Ambiguous) environment, there is an immense opportunity to develop and hone the competencies that support individuals as they navigate these challenges. At the core is a need for interpersonal savvy that includes the ability to communicate well and develop effective relationships based on principles of trust and value. This is separate from the technical communication skills that you use to perform your jobs well. It is about your ability to build self-awareness and capacities to negotiate, persuade, resolve conflict, have successful conversations, give effective feedback, and demonstrate personal leadership and engagement on the job.

That's a tall order for sure, and while you're not computers or bots who can be programmed for 100% uptime and accuracy, as humans you can strive for self improvement, utilize your analytical skills with a filter of accountability and empathy, and find value in both the tangible and intangible qualities that enhance human interaction and lead to better, more collaborative outcomes.

A Project-Management Scenario

Let's take a common team assignment that could involve a variety of technical communication roles. A new Wiki is being introduced to replace an outdated tool that was initially created for the client services unit when the company was a lot smaller and people got things done virtually any way they knew how under a few basic guidelines that were recorded for posterity. In light of rapid growth, the focus is on efficient and scalable solutions, which means providing staff with standard operating procedures that accurately reflect current and approved intra- and inter-departmental processes that are also customer-centric.

As a member of the project team, you might be naturally concerned about the impact of:

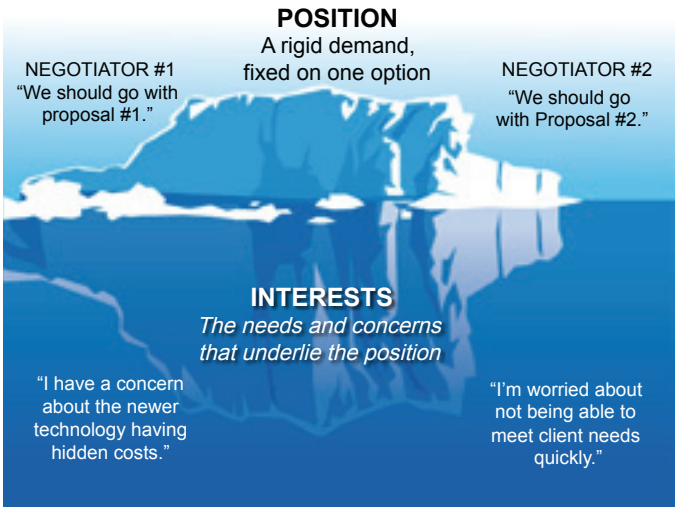
- Unclear project goals
- Unrealistic deadlines
- Lack of accountability
- Waning stakeholder engagement
- Inexperienced/unassertive project leader
- Insufficient skills

In an effort to not let the prospect or reality of any or all of these challenges cause a complete derailment, let's look closely at three essential practices that can help all members of a project team get in the mindset of collaboration. Project rescue begins!

1. Leveraging Interests

We know that project teams (even if exclusively made up of internal parties—i.e., no vendors/consultants) are complex, multi-party undertakings. They involve tangible resources—time, money, and people—and intangible resources—trust, honesty, and reputation. Moreover, they involve working relationships that are continually evolving. Just because you're on the same "team" does not equate to common goals, aligned expectations, or even mutual respect right from the start. One skill project teams require is to be able to come to agreement well.

In our experience interviewing, coaching, and assessing thousands of professionals who have followed our curriculum, there is a foundational element that can help foster positive direction when a project team needs to reach agreement: leveraging interests.


POSITION
A rigid demand, fixed on one option
NEGOTIATOR #1
"We should go with proposal #1."
NEGOTIATOR #2
"We should go with Proposal #2."
INTERESTS
The needs and concerns that underlie the position
"I have a concern about the newer technology having hidden costs."
"I'm worried about not being able to meet client needs quickly."

Accordance, Inc.

What lies beneath? It is essential to get below the surface of positions.

How often have you sat across from someone who was seemingly resistant to the options presented? They state their position, they posture and are pretty inflexible, forcing a response, and you never really understand their needs, motivators, or concerns. And how often have you actually shared yours? In order to truly grasp what problem the team is trying to solve, you must know your and everyone else's interests, otherwise you're treating the symptom (i.e., *position*) and not finding a cure for the root cause (i.e., *interest*).

Get in the habit of asking yourself and others "why?" For example, "why do you feel that three weeks isn't enough time to complete a first draft?" It is essential to recognize what you and they want/need, and to take an honest inventory of one's underlying interests when you engage in a collaborative endeavor. Arguably, these are subjective interests, tailor-made to a person's situation, expectations, and experiences. In most cases, the openness and confidence with which you speak about interests is worth more in terms of being able to creatively brainstorm relevant options versus guarding your true interests and presenting an intractable position that may bring things to a standstill, foster resentment, and ultimately create an imbalance towards "win-lose" or even "lose-lose."

How might the responses vary if, instead of the position "it can't be done in that much time," the person indicated, "I'll be on vacation for one of those weeks" or "I have a major deadline for another project that same week" or "my ability to complete the draft is dependent on the scheduling of interviews with account managers who have end-of-month quotas in the middle of this." Unearthing and leveraging the important interests of all parties is a more direct path toward mutually satisfying outcomes.

Understanding one another's interests can also strengthen relationships and build a higher level of trust. The more authentic you are, the more you cultivate a deeper relationship status, and the lower the potential for assumptions to get in the way and misunderstandings to arise. The willingness to share information and the genuine curiosity to understand inspires trust. As you know more about people's interests, you're likely to increase the efficiency of your conversations and negotiations by leveraging common interests to reach agreements faster.

2. Broadening Perspectives

Another essential practice for minimizing misunderstandings and creating collaborative environments on project teams entails broadening your perspectives beyond your own in all of your interactions. Most of us come to meetings or conversations thinking about what is important to us and view the situation from our perspective alone. We may only focus on advocating our interests, get stuck in positions, or experience others doing so. For a holistic picture of the situation and better results, view the situation from three perspectives—third person, second person, and first person.

To start, act as an observer or fly on the wall and look at the problem from a neutral place. The objectivity you bring with this perspective may highlight something new that will allow further collaboration.

Once you have acted as a witness to the situation, next put yourself in the other person's shoes and consider what might be important for them, especially from their role on the project team. When you try to see how they might think or feel, again you may become aware of valuable information, stimulating creative ideas to solve the problem or empathy for better understanding of your team members. Asking questions of other people and really listening to their responses to learn more from this perspective will open up possibilities you may not have reached.

Having viewed the situation from the third and second perspective, you can return to first-person perspective and advocate and share your viewpoints and needs. Doing so honestly and genuinely will be more influential. Due to a psychological principle of reciprocity that motivates us to reciprocate when someone has done something for us, you are more likely to be heard when you show curiosity and empathy. If you listened well to another person, they often feel compelled to do the same. By bringing all three perspectives to your team meetings and conversations, you develop a stronger understanding of the whole picture and increase the likelihood for solving problems more easily and effectively.

3. De-escalating the Tension

Whether your team gets off to a rocky start, or sprints out of the gate only to go off the rails at some later point, there is a need to get back on course so that failure is not a foregone conclusion. Tension is virtually unavoidable when deadlines are looming and resources are limited, so learning how to de-escalate it is the third essential practice for a collaborative mindset. When you learn to work through conflict, you develop innovation and creativity, strengthen relationships, and build trust.

Several strategies you can enact yourself when conflict arises in your relationships are drawn from life lessons shared by Grande Lum, negotiator, professor, and author

of *Tear Down The Wall: Be Your Own Mediator in Conflict* (Optimality Press, 2013). In some scenarios, tension may get triggered in you, but you have the fortitude to not make it transparent. While that tactic may work in the short term, the effects can be fairly taxing and ultimately that pent up frustration comes out of you. When the inevitable occurs, and you find yourself needing to mediate your own conflict, it is important to make conscious choices rather than just unleashing automatic reactions.

It's Me, Not You—First, think about how you may have contributed to the problem at hand. It's a natural tendency to immediately go to all of the ways the other person created the conflict. Pause to consider what you may have done or were perceived as doing and how that may have triggered the other person thereby escalating the tension. With this self-awareness, you can take the next step of moving past the underlying shame or self-criticism you're feeling, which many of us have underneath our anger or frustration. As each side's behavior in the problem becomes clearer, you can take accountability to diffuse the situation.

Talk About Your Talk—There are two tracks that are happening in conflict. There's the subject of your disagreement and there's also the context in which you and the other person(s) are engaged in conflict. It should not be surprising that the way we talk can ignite tension more than the content of what's being discussed. Naturally, then, a key to resolving conflict involves extracting the "what" from the "how" and addressing each person's perspectives and needs around both.

Use Demands As Clues—When you pause when having a reaction to someone's demands and act more like a sleuth, you can develop an easier process for mediating conflict. Their demands are clues to what's actually driving and motivating them and what their underlying needs are in the situation. Stop lobbing your own demands back at them and instead, become an investigator. Listen and then ask questions to help you understand their side of the story.

Affirm the Positive; Ignore the Negative—Showing appreciation to the other person is an invitation for them to model your behavior. Affirmation is something most people crave and it sends a collaborative signal to the other person. Finding something positive in what the other party says helps turn the corner on the conflict dynamic by creating a more promising, optimistic conversation.

Accommodate Without Caving In—Accommodating comes from a desire to support, to achieve harmony, to be liked, and to sidestep perceived pain. Be open and generous when it comes to interacting and communicating with the other person, while staying assertive and tough on the problem itself.

Know When to Respond and When Not to Respond—Fight or flight responses have their advantages and disadvantages. Fear and avoidance of fights may cut off crucial topics that need to be addressed. Conversely, reacting in the moment and unleashing your temper may worsen the situation. Consider the timing and your audience. A frank conversation may not seem ideal but you can work toward constructiveness. Resuming the conversation even after a short break provides a calmer context in which to focus on mutual interests and creative options.

A Collaborative Mindset Is a Strategic Mindset

Consistent effort to communicate with others on your team, outside of, during, and post-project, all have measurable value in cultivating relationships that tip the scales in favor of a desire to collaborate. Remember that the time to develop, nurture, and repair working relationships occurs well before you actually need them. And yet, even with the best laid plans, the reality is we're all human and we need to factor in that there will be an emotional component to manage at some point in the process.

Rather than responding to someone's negative tactics or disengaging completely, employ this more strategic approach by shifting your mindset to focus on ways that ignite collaboration—leveraging interests, broadening perspectives, and de-escalating tension. By taking the initiative or responding in kind, you show a level of accountability for your behavior and actions (or inactions) that engenders the same from others. It's not about being perceived as the perfect writer, developer, designer, and so on, but rather how you use your awareness and perspective to address the missteps, misunderstandings, and other obstacles to achieve a win-win outcome.

Ultimately, successful projects are part art, part science, and require a combination of interpersonal and technical competencies. It is important to highlight that any member of a project team can initiate as well as follow these strategies for successful communication in projects as they are not intended just for project managers/owners, supervisors, and executive sponsors. Recognizing when a project has gone awry and using collaborative practices to tear down the "walls" that divide the team is the best way to a successful rescue.

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Minimize the Risk Associated with Project Rescue

By TOM MOCHAL

PROJECTS HAVE PROBLEMS. Most problems arise and are solved. On some projects, however, the problems add up and are compounded to a point where they cannot be resolved successfully. These are sometimes called "troubled projects." These projects may limp along to the finish line. However, if the sponsor and management stakeholders have the perception that the project cannot get to the finish line, a project rescue should be attempted.

Project rescues are radical measures. A formal project rescue means that you have given up on the ability of the project manager to right the ship. Project rescue is not an attempt to repair a sinking ship. It is an attempt to raise a ship that is already underwater.

First Things First—Is the Project Really in Trouble?

When you are looking at a "troubled" project, the first thing to validate is whether the project is, in fact, in trouble or not. In many cases, there is the perception of a problem when there really is not one at all. In other cases, a project may be in trouble, but the project manager might already have begun a process of damage control and correction. Sometimes the project has problems, but the problems are not significant enough for the project to be considered troubled. For instance, if a nine-month project is scheduled to complete a week late, you would need to decide whether it really is in trouble.

The following provide some examples:

- The project is trending over its estimated budget by a greater percent than the agreed-upon acceptable tolerance.
- The project is trending over its estimated deadline by a greater percent than the agreed-upon acceptable tolerance.
- The project appears within tolerances, but only by compromising on quality to the point that the value and integrity of the deliverable are called into question.
- The client is extremely dissatisfied with the performance of the project team. If the client had to do the project again, he or she would not use the same project team.
- The client-project team relationship is dysfunctional. This could include situations such as the client and sponsor losing interest in the success of the project or major animosity between the project team and the client.

Minimizing the Risk of Troubled Projects

By their nature, project rescues are very risky. There is a lot that can go wrong and, if you are not careful, the rescue can be dragged under just as the original project was. However, by structuring the project rescue correctly, you can manage these risks successfully.

Step #1: Isolate the Rescue Work into a Separate Recovery Project

This is the key to success. The recovery project is the project that will rescue the troubled project. Many organizations view project rescue as a time for the cavalry to come charging up the hill. Instead of just jumping in, the first thing that needs to happen is to recognize that the work to recover the troubled project *is itself a project.* The project manager accountable for the recovery project is most likely not the project manager on the troubled project, but someone with a demonstrated track record in rescuing troubled projects. When the troubled project is in crisis, the sponsor and key stakeholders will be looking for strong leadership that

> The way to manage the risks associated with a project rescue is to structure the rescue work itself as a project.

can organize and execute the project back to the regular routine of any project.

Since the recovery is a project itself, the first thing that needs to happen is a definition and planning process. Just as with a regular project, the definition and planning process gives you a chance to validate the following:

- The purpose of the recovery project (overview and objectives)
- The deliverables to be produced (scope)
- The other aspects of scope including validating the organizations that will be included in the recovery project, the portions of the project to recover, etc.
- The sponsor, project manager, and other key stakeholders of the recovery project (project organization)
- The estimated duration and cost of the recovery project
- The assumptions and risks associated with the recovery project, and how the risks will be managed

It is important to make sure that the project manager of the recovery project is in synch with the sponsor of the work that is to be done as a part of the rescue. Once the recovery project has been defined and planned, the sponsor and appropriate stakeholders should approve the project charter.

Step #1A: Gain Agreement with the Sponsor on the Deliverables of the Recovery Project

This is actually a subset of the first step, but it is important enough to have its own headline. In many recovery projects, the primary deliverables are a revised project charter and project schedule for the troubled project. The charter and schedule cover, at a minimum, what is often referred to as the recovery plan. Additional deliverables might include:

- New/revised project management procedures
- New/revised risk plan
- New/revised communication plan
- New/revised team members, probably including the project manager of the troubled project
- Assessment (of the troubled project)
- Alternatives and recommendation (to address the troubled project)

You want the recovery project to create or update the project management deliverables for the troubled project. However, the more work that is required from the recovery project, the riskier the recovery will be.

Step #2: Assess the Troubled Project to Determine What Went Wrong and Why

It is very risky to propose alternatives for rescuing a project without first doing an assessment of the causes. As a part of the initial briefing, you are likely to talk with the sponsor or

other key stakeholders. They will certainly brief you on the background and the problems. However, they are just one voice that you will need to listen to. Even information that comes from the sponsor should be validated and confirmed by others before the assessors make any decisions.

To be effective, the assessment must include:

- Project team
- Sponsor
- Client managers
- Users
- Vendors, suppliers, and other third parties who have a high degree of involvement

Assessing all the major stakeholders will not only allow you to see a more balanced view of the project, but will also help you in implementing the recovery plan. People tend to respond better to adversity and change if they think they have been consulted and had input into the recovery process.

Step #3: Be Open to Every Possible Alternative, Including Canceling the Project

After the assessment is complete, alternatives should be developed along with a recommendation. The alternatives will vary greatly depending on the causes that were uncovered during the assessment. However, a couple of alternatives will normally always be considered:

- **Stop the project.** If a project is in bad enough shape that a rescue is required, the team should always leave open the possibility that the project should just be canceled.
- **Do nothing. Let the project continue as is**. In some cases, the sponsor may determine that the cost of a project rescue is not worth pursuing. For example, a project may be projected to complete at a budget 90% higher than estimated. However, the assessment may determine that the project cost was underestimated. In this case, there is not much that can rescue the project. The sponsor is forced to accept the higher cost of the project, cancel the project, or scope back the deliverables.
- **Make specific recommendations.** In most cases, the recovery team will propose alternatives and make a specific set of recommendations for the work required to complete the troubled project.

The sponsor needs to evaluate the options and choose how to proceed. The trick is to pick an option that provides the best chance of success on the remaining work. The risk of choosing the wrong rescue option is managed by making sure that your sponsor and management stakeholders approve the recovery plan, taking the alternatives and recommendations into account. If a broad audience was consulted to create the alternatives, and if these same people buy in to the final recovery plan, the chances of the rescued project completing within revised expectations will increase dramatically.

Step #4: Activate, Measure, and Monitor Recovery Plan

Once you have gained agreement on the recommendation, you will now activate, measure, and monitor the recovery plan. There are two options for implementing the recovery plan. The first is to implement the recovery plan as a part of the recovery project. This implies that there is no longer a need for the originally troubled project and the recovery project will now complete the remaining work. The second option is to close the recovery project and execute the recovery plan in the troubled project. In this case, the troubled project (i.e., the newly rescued project) is now adjusted to complete the work according to the recovery plan.

There is always a risk that the newly rescued project will have additional problems after the recovery plan is in place. This risk has to be managed through proactive monitoring and measurement to validate the status of the recovery plan and the project in general. The worst result of a project rescue is that the recovery itself fails. If this happens, not only is the entire project likely to be canceled, but there may be repercussions for those involved, including a loss of credibility.

Depending on the duration remaining on the project, this may also be a time when the project manager needs to use techniques for micromanagement. Normally, you might not want to be involved in the team work activities on a detailed basis. However, when you are in a recovery, you may need to keep a close watch and follow up on all outstanding work.

Summary

Project rescues are not for the faint of heart and they are not appropriate for a project that is having typical problems. However, if you have a large and important project that is off the rails, it might be time for this radical intervention.

If you perform a project rescue, be smart about it. Can you image a worse scenario than trying to rescue a project, only to see the rescue effort itself fail?

The way to manage the risks associated with a project rescue is to structure the rescue work itself as a project. This isolates the rescue work into a separate entity with its own project charter, schedule, and deliverables. The purpose of the rescue project is to not to carry on the work of the failed project. The purpose of the rescue project is to come up with the new project charter, new schedule, new estimates, new deliverables, and anything else that is required for the original troubled project. The rescue project then ends and goes away. The sponsor, project manager, and management stakeholders must then do a much better job of managing and monitoring the formerly troubled project to ensure that it can now be finished within the revised set of expectations.

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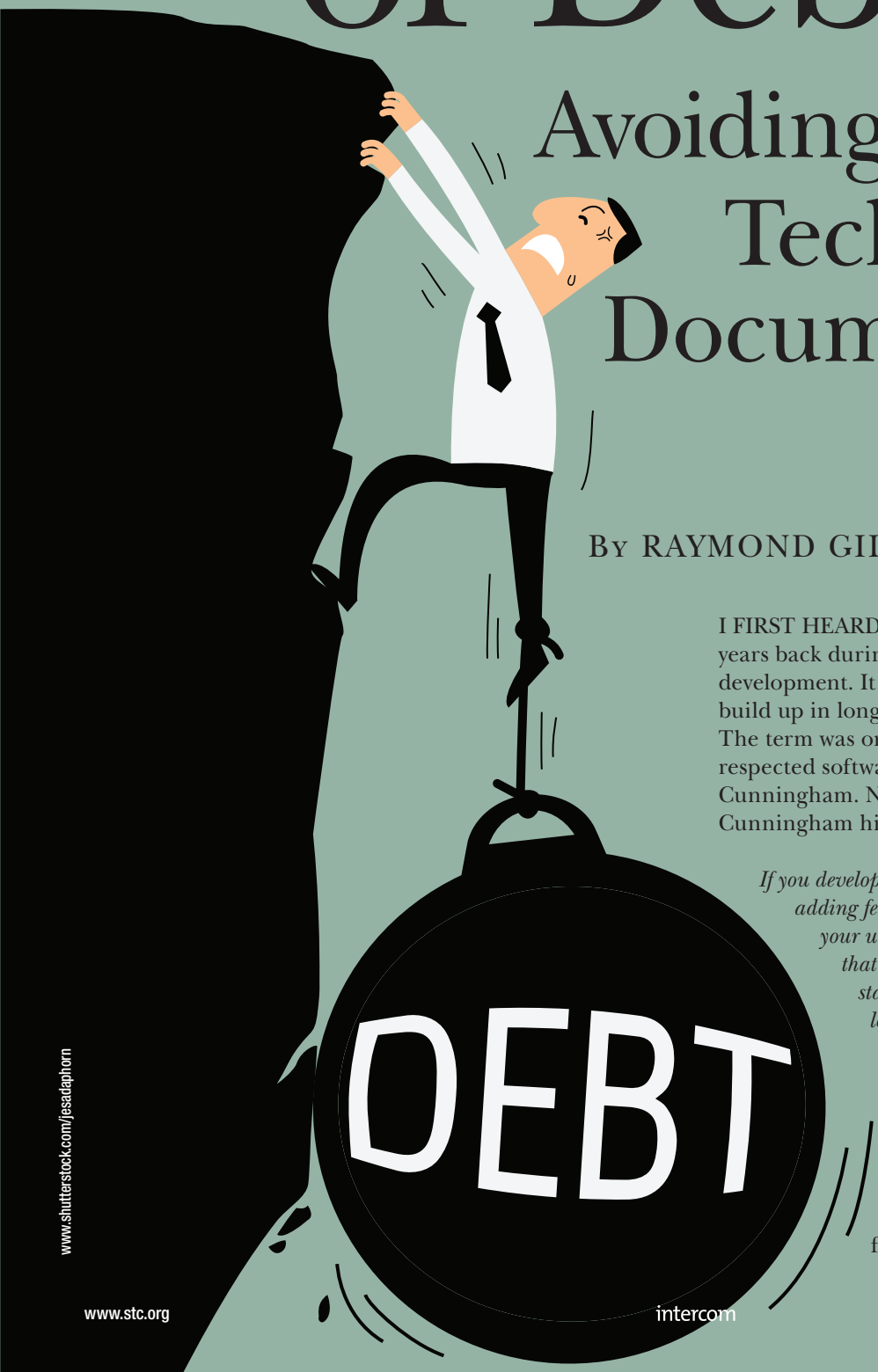
Getting Out of Debt:

Avoiding Bankrupt Technical Documentation



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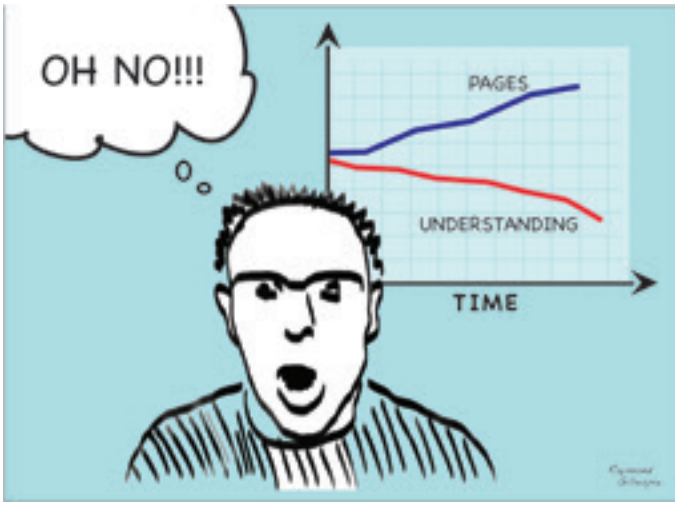
By RAYMOND GILLESPIE | *Senior Member*

I FIRST HEARD THE TERM "technical debt" a few years back during a training course on Agile software development. It refers to a "knowledge debt" that can build up in long-term software development projects. The term was originated over two decades ago by the respected software engineer and Wiki pioneer Ward Cunningham. Nobody explains the concept better than Cunningham himself:

> *If you develop a program for a long period of time, by only adding features, and never reorganizing it to reflect your understanding of those features, then eventually that program simply does not contain any understanding. All efforts to work on it take longer and longer. In other words the interest [on the debt] is total.*

Now, reread those words, but this time, substitute the phrase "documentation set" for "program." Could this describe a documentation project that you have heard about, or come across, or—heaven forbid—worked on?

In my case, the answer is yes. And from conversations with other technical communicators, I know that I am not alone in having worked on documentation that seems to be nearing the point where it "eventually … does not contain any understanding."



Debt: A Useful Metaphor for Documentation

Cunningham's inspiration for the debt metaphor was the work of the linguists George Lakoff and Mark Johnson who argue, "the way we think, what we experience, and what we do everyday is very much a matter of metaphor."

By using the debt metaphor, Cunningham found he could better explain to his boss why his team was struggling to understand the complex financial software they were developing. In short, they had a knowledge debt. And there was interest to pay on that debt—in terms of time and energy to regain their understanding—if they were to resume making progress.

The debt metaphor also enabled Cunningham to propose a solution. By refactoring the software—by studying it, understanding it, and restructuring it—they aimed to "make [the code] look as if we had known what we were doing all along." Cunningham had in effect come up with a debt repayment plan. A plan that would allow them to gradually reduce the knowledge debt, gradually improve the structure of their software, and gradually reach a point where the project could again move forward from a position of understanding.

I would argue that the technical communication profession could adopt the debt metaphor to help us understand and talk about knowledge gaps in our complex projects. The question is, can we borrow some of the debt repayment ideas pioneered by our engineering colleagues and apply them to indebted documentation? Can we, in a similar way to them, refactor our documents to make them look as if we had "known what we were doing all along?" We will return to this question later on. First, let's look at some causes of debt in documentation sets.

How Does Technical Debt Accrue in Documentation?

There are many possible reasons why debt can creep into a documentation set. Here are three that I have witnessed.

1. Documenting New Features Only

In this day of tight deadlines and lean documentation teams, we have to budget our writing resources carefully. We have to prioritize, and it usually makes sound business sense to prioritize the documentation of new features. But this comes with a risk: it can lead to a chronic neglect of previously written documentation.

For example, in one project I worked on, new product features—the features which generated revenue—were provided to the customers in "minor software releases" every three or four months. For each new feature, we wrote a description of that feature, as well as instructions for its installation, activation, and usage. The new documentation was well written, well tested, and well received by our customers. However, we often postponed the update of older documents to reflect these new features. This work was instead scheduled for the next major release. By the time this big release came round, the backlog of work for the older documents was substantial, our knowledge resources insufficient. With each release we were sinking deeper into debt.

2. Increasing Complexity of Projects

Most technologies, and thus most software products, get more complex overtime. Take, for example, the field of mobile telecommunications. I was first involved with a telecom project in the late 1990s. At that time, mobile networks were relatively simple 2G networks. Since then, we've had 2.5G, 3G, and 4G—each generation introducing its own forest of standards, its own new technologies, its own challenges for remaining compatible with the generations that preceded it. Understandably, it is becoming increasingly difficult for technical communicators in the telecom field to keep on top of this complexity. Some degree of technical debt is inevitable in the documentation of a large telecoms product. I would also hazard an informed guess that keeping up with accelerating complexity is one of the biggest challenges facing documentation teams in many other fields.

> "Software systems almost always degrade into a mess."
>
> —Robert C. Martin

3. Knowledge "Churn"

When an experienced writer leaves a project, knowledge is lost. Similarly, when a documentation project is outsourced, or insourced, or moved in-house to a different team, knowledge is lost. Some loss of knowledge is inevitable for *any* moved project, regardless of its age, its complexity, or

how conscientious the previous team has been in following the "knowledge transfer" process.

When knowledge is lost from your project, you just have to hope it won't tip your documentation into debt. If it does, you will have interest to pay in terms of time, money, and intellectual energy to get back into the black.

How Do We Get Out of Debt?

Let's return to the question of whether we can apply the refactoring techniques used by our software engineering colleagues to the domain of technical documentation.

Read any textbook on the topic and it soon becomes apparent that automated testing is the key to successful software refactoring. By having a comprehensive set of regression tests that can be run nightly, daily, or even hourly, the engineering team can quickly see if any of their refactoring efforts have caused a test to fail. Thus, they can get on with tidying up the software, making it more understandable, without having to worry about "breaking the code."

> "There are no easy answers. There is no such thing as a best solution."
>
> —Andrew Hunt and David Thomas

Unfortunately for technical communicators, documentation normally doesn't lend itself to automated testing. So we have to get creative when looking for a means to safely restructure a particular set of documents.

To follow are a few example actions I've seen help reduce debt in problematic documentation projects I have been involved with. I hope that they will give you some ideas for preventing and curing debt in your project.

Get Close to the Software Testers

Software testers may be called any one of several names in your organization—quality assurance, system integration, functional testing. Regardless of their title, it can pay dividends to get close to the group that tests the functionality of the software. This is the team that tests to make sure that the software does what we've promised the customers it will do. To design, run, and analyze suitable tests, the testers need to fully understand not only what the software should be doing, but also how to install it, configure it, and run it. In other words, the *very same things* that we are writing instructions for in our documents.

In one project I was involved with, our writing team was lucky enough to be physically located amongst the testing team. We attended their test plan reviews, their training sessions, and even their daily stand-up meetings. This proximity gradually created a great working environment with advantages for both the testers and the documentation team. For example, testers began to correct errors in the documents that came up during testing, and even—with guidance from the writing team—became motivated to write the initial drafts of some operating procedures. But perhaps the biggest unforeseen consequence of this symbiosis was that the *knowledge* of the writing team—in terms of both technical and product knowledge—started to grow exponentially. And with this knowledge, the team began to have greater assurance when it came to editing and restructuring previously written "legacy" documentation. In short, the team, without any prompting from upper management, began to spontaneously refactor its documents.

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Get Close to the Customer Support and Software Maintenance Teams

For 14 months, I had the opportunity to work as a member of a software maintenance team. It was one of several teams supporting a complex telecom project for which I had previously been writing documentation. I found it a deeply educational and eye-opening experience on many levels. One of my tasks was to analyze customer trouble cases that had been escalated from the technical support team. From a documentation viewpoint, what jumped out at me was how few cases were due to errors in the documentation. However, there was a significant number of trouble cases due to:

- misinterpretation of overly complex or scattered instructions
- inability to find information
- looking at the wrong version of a document

In other words, problems that should not occur in a logically structured document set.

However, I observed that cases such as these—each one an indicator of the need to refactor the documentation—were seldom communicated to the customer documentation team. The problem was that the technical support and software maintenance groups were under great pressure to resolve customer issues quickly. There was a necessity to "fix" each issue as soon as possible and move onto the next one. Sending improvement requests to the documentation team was seldom seen as a priority.

If the situation in your organization is similar, I would recommend that you, as a technical communication professional, take the initiative to forge a communication channel with the technical support teams. Do whatever you can to get close to these busy colleagues, to extract precious information from them without adding to their already substantial burden. At the very least, make sure that you and your team members all have user accounts to whatever trouble ticket system the support team is using. Check the tickets regularly, look out for information-related cases you can help with, and learn about the issues that are affecting your customers. Then take the time to reflect on what you've learned and ask yourself how you can best use that knowledge to refactor your document set.

Stop Writing Books, Start Writing Topics

I recently met an ex-colleague who is working on the same project that I mentioned earlier; the project that overly concentrated on new features. He had good news for me. They have turned the corner and are now gradually getting the documentation out of debt. How are they doing this?

3 Ideas for Tackling Document Debt

- Get closer to the software testers
- Get closer to the customer support and software maintenance teams
- Use a topic-based writing approach

It turns out that they have recently shifted toward a topic-based writing approach, namely DITA. They are in the process of breaking documents down from their previous "big book" structure into small topics. This dissection has had an unexpected benefit in terms of their knowledge acquisition. It has forced the writers to think deeply about the meaning and structure of their documents. It is making them ask questions: Can I split this procedure into smaller task topics? Should I put this part into its own concept topic? Do I need this piece of information at all?

What is more, members of the team, who previously worked solo on their own big documents, are now talking with each other, looking for opportunities for reuse of topics and removal of redundant information.

With each question answered, with each discussion resolved, the knowledge of the team is increasing. Topic by topic, the debt in the documentation set is being paid off.

Conclusion

These are challenging times for technical communicators. Software and hardware are getting more complicated; documentation teams are getting smaller and increasingly bereft of experience. We need to recognize that these factors can lead to a "lack of understanding" creeping into our complex documentation sets. Cunningham's debt metaphor gives us a simple means to communicate about that lack of understanding. It is a metaphor that can be quickly grasped by other writing team members, by our development colleagues, and by our managers. Only by acknowledging that a knowledge debt exists in our documents, can we take stock of that debt and put together plans to repay it.

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Clinging to Ownership: Rescuing Content from SMEs

By MARIA WILLACY | *Member*

SUBJECT MATTER EXPERTS (SMEs) can be great assets—they provide knowledge, resources, credibility, and often the main content with which we work. But SMEs, perhaps unwittingly, can also be one of the biggest hindrances to technical communicators. They can be the fire blocking our way through a door to achieving good content, a formidable force that can sometimes be impossible to overcome and painful to navigate through. Without their trust, technical communicators may be left trapped in a haze of confusing sentences, with SMEs ignoring their advice and clinging to ownership. How can technical communicators get past such barricades to deliver good content? They can find another way through the fire.

Another Way Through

The most direct path for technical communicators to accomplish their work is to receive or create content and revise it into clear, concise materials readers find useful. But when SMEs are allowed to ignore our revisions, disregard our questions, and submit content without branding or formatting, technical communicators and the resulting good content are burned in the process. When appeals to management yield the answer, "Ultimately, the SMEs are the authors, so defer to them if they don't like your changes," what is a technical communicator to do? Instead of feeling helpless, find another way to accomplish your goals:

- **Practice customer service.** The first and perhaps most basic way to convince SMEs you're helping and not hurting their content is to provide exceptional customer service. This means listening to their needs first, assuring them you are there to help, and highlighting the value in their content. If you're doing this, you're one step closer to a SME wanting to help you in return.
- **Develop guidelines and explain processes.** Information is power, and when SMEs or management don't fully understand what we do, they're likely to stick to what they know instead. When we come into contact with a new manager or SME, it may help to show them specifics, such as a levels of edit sheet, style guide, or example of your work (see Figure 1). This helps gain their trust, which is key to relinquishing some ownership into your hands.

Level of Edit	Description	Tracked Changes
Basic	Perform a surface-level edit and ensure consistency of information (integrity check). • Proofread for spelling, punctuation, and grammatical errors at the sentence level. • Make wordy text concise (e.g., at the time = when). • Verify simple math. • Ensure the text accurately references all Literature Cited sources and tables and figures in order. • Verify acronyms and initialisms have been defined and are referenced correctly. • Ensure appropriate branding and company standards are used. • Check the formatting of the entire document, including Literature Cited, tables, and figures.	No
	• Ensure sentences, paragraphs, and sections make sense and are logically ordered and formatted. • Ensure repeated numerical values are identical. • Ensure word choices are consistent. • Change passive voice to active and ensure third-person narration. • Ensure lists have parallel construction. • Verify accuracy of names, including scientific and common names. • Note repetitive text.	Yes[1]
Advanced (includes Basic)	Rearrange sentence and document structure to convey information as clearly and efficiently as possible. • Change nominalizations to verbs. • Eliminate unnecessary phrases, words, or text. • Ensure sentences are in subject-verb-noun order. • Insert sentence and paragraph transitions. • Insert explanatory text.	Yes[1]

[1] If the editor finds inaccurate or inconsistent text, he/she will contact the author or leave comments regarding these discrepancies.

Figure 1. Levels of edit worksheet

- **Keep asking questions.** Just because you've been ignored or told "no" multiple times doesn't mean you should stop asking. It's the technical communicator's job to ask questions and to point out inconsistencies. Just make sure you don't annoy SMEs by repeatedly asking the same question—the goal is to get them on our side, not convince them we don't understand their side.
- **Provide options.** SMEs are busy and most aren't wordsmiths, so they are more likely to change content if it requires less work for them. Instead of simply pointing out an inconsistency or an awkward sentence, provide options for the solution. Options let them feel like they still have control, and doing the work for them saves them time to focus on their priorities (see Figure 2).
- **Rotate jobs.** Sometimes personalities don't mesh or a frustrating job leaves a lasting impression. While this doesn't mean the technical communicator and SME shouldn't work together again, it may mean a break is good. If you have the option, try pairing another technical communicator with the SME on future projects and see if you get better results.
- **Accept losses.** Losses are what we're trying to avoid, so why should we accept them? Because to win some, sometimes you have to lose some. The idea is that your work in other areas will eventually sway SMEs toward helping you accomplish your goals but, in the meantime, you need to show you're willing to work with them as well.
- **Represent the bottom line.** Although easier said than done, finding examples that show the monetary benefit your work provides is especially helpful in gaining support for your work. This might mean conducting usability testing on a procedure you wrote versus the version the SME wrote—how many calls came in, and how much subsequent time did the company save from users who followed your procedure?

Many technical communicators have to work with SMEs, and often we enjoy it. But when the value of our work is forced to take a backseat to ownership and distrust, it's our job to keep striving to show our value. If we do this, doors will eventually open, and we can walk through them without fighting fires.

MARIA WILLACY *is a technical editor at Idaho Power in Boise, Idaho. She graduated from Boise State University in 2010 with a BA in English, technical communication emphasis. She has nearly five years of technical communication experience and is pursuing an MA in interdisciplinary studies with a corporate communications emphasis from BSU.*

1. After reaching the home page, click About Us. From the menu, click Background.

Comment [MW1]: I suggest breaking this into multiple steps so it will be easier for users to follow. Or, I could format it like this:
After reaching the home page, click About Us > Background. Let me know which you would prefer and I can format it for you.

Figure 2. Options for editing a procedure

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From Marketing to Methodology:

Writing in a Technology Company

By DAVE WRIGHT | *Member* and HARRY CALHOUN

WRITERS AND EDITORS who work for technology companies have to acknowledge the challenges, limitations, and opportunities that writing about technology bring. Some writers have a "pure" writing background but have to pick up the technological part as they go along. Others might have more of a technological bent but have to learn how to craft their writing to accurately describe the products and services of a "techie" company.

In this article, two writers examine the rigors and unique aspects of writing within a technology-based company. Harry Calhoun had a strong background in marketing writing but had to pick up the more technical aspects of writing and editing in his job. Dave Wright began his technical writing career with a strong writing background and now works as a senior software engineer and information developer.

The Marketing Writer Gets Technical

Harry: When I came to write for a technology company nearly 14 years ago, I had been working as a marketing writer for over 20 years, so I knew the pitfalls that marketing writers—perhaps writers in general—encounter: nonexistent source material, clients who kept adding more product information while exhorting the writer to keep it short, and bad direction from people who tend to dislike my conversational writing style. I soon found that writing for technology companies presents a unique set of writing challenges, and that writing and editing technical copy was not the same as working with marketing copy.

Whatever marketing writers are selling—training programs, software, hardware, or some mixture—their employers or clients generally recognize them for performing the valuable function of selling the products. This activity can be regarded with suspicion in technical environments, where coworkers and clients alike tend to regard marketing as "fluff" and want writers to stick to product descriptions with a minimum of sell. To make matters worse, clients often want the writing loaded down with technical specifications and other copy that is sleep-inducing to those less technically inclined. These factors make it difficult to write the short, punchy copy that is at the heart of good marketing writing.

In the years since I've increasingly written and edited more technical pieces, I have found that people who design the products often think these products stand on their own without having to address marketing issues. Writing from the viewpoint of an engineer or programmer, or editing their words, I just don't get the marketing "oomph"

so much as just the straight facts. I've found this to be an eye-opening, interesting, and in some ways refreshing approach. I don't have to sell the product so much as let it stand up for itself.

So how do writers know when to write in a more technical style and when to use their marketing skills? Part of it, obviously, is what the client wants and what the written piece is intended to achieve. If the client wants a strictly informative piece, a white paper that sticks to the facts and relies on no marketing "wow factor," that's what the writer should shoot for. If the client wants to sell his or her product, then off to marketing land we go.

With my background in marketing, it's easy to steer my client toward benefits-oriented writing. But as I've gotten into more technical writing and editing, I find that subject matter experts from development groups often want to explain *how a product works*, or *how it was developed* instead of how it will benefit the customer. And so I've had to learn to do this type of writing. It's not that hard, really—just different and a change from what I've been doing for most of my career!

What You Need to Know

Harry: At companies such as IBM*, where various types of writing are performed, a marketing writer needs an unusual blend of writing skills to thrive. A rule of thumb is that if you're doing marketing writing, a high-level knowledge of how the product works is all that's really necessary. If you need to understand the product more intimately and describe it in detail, it's probably not effective marketing so much as technical writing.

What you *do* need to be intimately familiar with are the benefits of the product to the target audience. Writing about IBM® Worklight® Version 6.1, for example, I only had to know the rudiments of the product and its strengths so that I could market them to an end user. When I had to switch my focus to technical writing, however, I needed to know the full range of Worklight Version 6.1 functions—not only those needed to market or sell the product. So while some writing, like marketing copy, strives to impart information that sells the product, technical writing involves communicating complex information to those who need it to accomplish some task or goal—including simply understanding the overall product better. According to the website *techwhirl.com*, "technical writing is sometimes defined as *simplifying the complex*."

My marketing copy glossed over the deeper points of a product—who cared whether Worklight helped users to efficiently develop, deploy, run, and manage HTML5, hybrid and native mobile applications, or standards-based technologies and tools? All I cared about was that it helped Worklight users reduce their time to market, make development cheaper and less complex, and give them a better user experience. When I started writing technical documents, I had to care about, and pay attention to, all those finer points that made the product what it was—not just the benefits to the end user, but how and why it produced those benefits.

Roadblocks to Effective Marketing Writing

Most experienced marketing writers have encountered these problems when working in a technical environment:

- Your client wants to throw technical specifications into the mix, making it difficult to write effective, short, punchy copy.
- Clients keep adding product information that increases the length of a brochure, mailer, or other piece—which makes it longer and more boring to read and means that the benefit to the reader is lost or obscured by product descriptions.
- Frequently, the previous problem is compounded by client exhortations to "keep it short and punchy."
- "Garbage in, garbage out"—client provides bad or inaccurate source and you are forced to use it or dig it up on your own.
- Clients not understanding that *they* are the experts and must provide the source—you as the writer typically don't have it.
- If you're writing for an internal client but directing your copy toward an external audience, you might encounter an environment filled with lots of internal "nicknames," acronyms, and pet names that are not suitable for external consumption. But sometimes your internal clients are attached to those names and want to use them. It's your job to make sure they don't.

A Technical Writer with a Strong Writing Background

Dave: Before taking a corporate technical writing position about 20 years ago, I'd worked as a newspaper writer and photographer, published short fiction and scholarly pieces, completed graduate degrees with an emphasis in writing, and taught all of the standard university-level writing courses. Now when I see traditional coursework for Master's degrees in technical communication, the assignments are familiar because I've taught those subjects. It's said that if you want to really learn something, teach it, and I've found that to be true.

Although I was well-prepared to become a technical communication professional in terms of writing experience and skills, I still had much to learn, and the "applied science" aspect, grappling with and learning technical content and working in a highly technical environment, presents a constant learning curve. I

believe that successful technical writers must know how to learn and how to use strategies for developing and delivering content as efficiently as possible. If Flaubert actually spent an entire day to change one word in a sentence, and then change it back … that wouldn't do in a technical communication role.

Considering the challenges of writing in a technical company, people often focus first on the technical nature of the content. What's a node? What's an image volume? What's a namespace? And how do these things work? While the jargon and the functions can be learned, doing so across a range of products can be a difficult technical endeavor. Distilling design and architectural specifications totaling in the hundreds of pages, and then developing from those the nuggets needed by end users, can be a daunting task.

The Technical Environment

Dave: Surrounding the technical content is the technical environment itself, the tools and processes and the progressive churn involved in delivering the product. Highly technical people often create complex technical processes. Anyone using DITA-XML with content reference tags for content re-use, and single sourcing files to support multiple products, where anything from single words to entire sections can be made to display or disappear depending on proper code management, is working in a complex environment. This type of setup can involve thousands of files, and the processes that produce the output from this setup are equally if not even more complex. Some people have the technical aptitude to manage it and others do not. The end deliverable can be a website containing thousands of files with thousands of links, or large, product-integrated software documentation. Technical communicators must ensure that each element works, that the text meets quality and accessibility standards, and that the content is accurate and up to date.

My first position as a technical writer involved working with one source file version control system, one defect tracking tool, and one content creation tool. A few companies and many years later, I now need to be handy with four file version control systems, three defect tracking tools, four content creation tools, and a slew of other software tools as required for related tasks—tools such as Perl, JavaScript, FTP software, Putty, Cygwin, Tidy, and Saxon. Translation processes involve even more tools, as files must be packaged and shipped to translation centers, processed in a variety of languages, and then likewise pass content verification and quality control checks.

While needing to stay current with those tools, writers in a large technological company must also navigate changing standards and requirements that help present a consistent product design, lessening customer learning curves and capitalizing on an established market brand.

Applicable Education and Self-Study

Employers often seek software skills in their hiring process, so consider actual technical writing activities. Experience with some of the following can be of value in the hiring process:

- Online content development tools
- Desktop publishing tools
- Graphical user interface design
- Usability studies
- DITA-XML
- eLearning
- Information architecture

If a position that you're targeting requires a specific software tool, consider buying a down-level version at a reduced rate on the Internet and then learn how to use it. The difference between the current version and an older version is likely in the details, and employers favor those who can use the tools in place. STC, likewise, offers a broad array of relevant education.

Information architecture also presents certain demands that must be met, again involving a set of standards and requirements. So, too, with project management, with eLearning, with graphical user interface design. The more of these elements that people cover in their work, the more complex and demanding their day-to-day activities. One significant reward in working within a large technical company is that these areas present growth and leadership opportunities. A company with a lot of seats to fill often finds that writers have the skills necessary to succeed in a wide variety of roles.

* *The authors are speaking for themselves and not on behalf of IBM. The information presented here does not necessarily represent IBM's positions, strategies, or opinions.*

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DAVE WRIGHT*, PhD, is a senior software engineer and information developer in IBM's Storage and Technology Group. He shares responsibility for product user information across multiple Storage products, and has had pieces in various publications including* Northwest Review, American Literary Review, Quarterly West*, and STC's* Intercom *magazine.*

Being Part of a Teleworking Team

By SERENA BECK | *Senior Member*

GETTING INTO YOUR car, sitting in rush hour traffic, and then arriving at the office an hour later may soon be an antiquated way to work. The trend of companies allowing employees to telework is slowly increasing in popularity. Telework may include working from home or a location outside your central office or home, for example, a coffee shop or another office in a different city than your usual central office. In the United States, "the percentage of workers who worked the majority of the work week at home increased from 3.6% to 4.3% of the population between 2005 and 2010, according to the American Community Survey" (*www.census.gov/prod/2012pubs/p70-132.pdf*). In Canada, "in 2008, 11.2% of employees worked at home, one percentage point more than in 2000" (*www.statcan.gc.ca/pub/11-008-x/2011001/article/11366-eng.pdf*).

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I have been a teleworker for three years. The team I work on consists of seven technical writers. Five of us work from home most of the time while two of us work from home one day per week. Two writers live in Canada and five writers live in the United States. We have weekly meetings using desktop sharing and a conference line. We try to all meet in person once per year at our head office.

There are benefits and challenges to adapting to being a teleworker. There are many things to consider, including communication challenges, socializing, work-life balance, productivity levels and distractions, and the cost benefit.

Communication Challenges

Christen Williams is a technical writer at Haemonetics. Her biggest challenge in communicating remotely is "remembering where people are physically in the world." In order to set up meetings with team members, you need to be mindful of their time zones. Sometimes time zones can work to your advantage. You might be able to email a question late in the day your time and receive an answer by the following morning. Some days I schedule meetings during my lunch time to accommodate coworkers.

When you are working with people internationally, language can be a barrier. If you have a poor phone connection and you can't hear or don't understand how someone pronounces a word, then you might misinterpret a message. One solution is to have a visual of the person and the material through video conferencing and desktop sharing. Another effective way to solve this issue is to have meeting attendees review meeting minutes, or if you aren't sure about a requirement, send an email to clarify details.

Liz Tricco and Hanna Hyde are technical writers at Haemonetics who work from home one day per week. Liz says that a disadvantage of working from home is that you cannot "run into someone in the hallway and find out information that you didn't know." Hanna states that another challenge can be "getting information people aren't willing to put in writing." Jenny Nelson, a technical writer at Haemonetics who mostly works from home, says it is "faster to get information in person. It takes longer at home." Learning and using your coworkers preferred communication methods—email, phone, or in person—might speed up the process.

Socializing

When you aren't face-to-face with your coworkers and you're at home busily working the day away, it can be hard to make time to socialize with your coworkers. Hanna uses Instant Messaging (IM) to have "informal conversations with people and build relationships." It's also convenient to use IM to ask someone a quick question or ask them what time to phone or have a meeting.

When I contact my coworkers, I try to connect on a personal level. For example, if I email or phone someone, I ask a non-work-related question first (e.g., how is your family do you have any vacation plans?) and then ask my work-related question. Some people like this and others don't; you really need to cater to individuals' needs. To keep your team engaged, get together in person for company activities and meetings. I find it helps if I have met everyone I work with in person at least once. However, if you're new to a team and can't meet in person, sending a photo or using video conferencing might be useful. The next time you're on a call, you can at least match a face to a voice. This is especially useful if you cannot distinguish individual voices during calls.

Work-Life Balance

Depending on your company's policies, you might be able to work flexible hours so you can, for example, watch your daughter's recital during the day and then make up those hours in the evening. You might be able to set your own hours that work best for you and your team's schedule and time zones. As long as deadlines are met, it might not matter what time of day the work is completed as long as you get in your hours for the week. Colin Beck has managed to find a balance. He works from home full-time as a project manager for Telus and goes into the office once per month for large team meetings. He says, "working from home has had a huge positive impact on my life. It's given me the balance between work and family that I've been looking for."

It might not always be easy to find a balance if emergencies arise or people need to call you outside your set working hours. It can be tempting to always be "on" if you work from home because it's easy to monitor email from multiple devices 24/7. In Canada, "among full-time employees who said they were dissatisfied with their work-life balance, 54% of those who worked at home attributed their dissatisfaction to spending too much time working. For employees who never worked at home, the proportion was 44%" (*www.statcan.gc.ca/pub/11-008-x/2011001/article/11366-eng.htm*).

If you do need to work overtime, Warren Chamberlain, a technical writer at Haemonetics, has found a good solution for finding a balance. "During crunch times, when I'm working later into the evening, I like that I can start a document build (which can take 30 to 45 minutes) and hang out with my family until it's done. It's nicer than sitting in a cube waiting for it to finish so you can go home."

Productivity and Distractions

For Jenny, whether she is working in the office or at home, her "productivity is the same in both places and one environment isn't better than the other." This might not be the case for all workers, but hopefully you can adapt to be self-motivated and self-disciplined to successfully work from home.

I had a hard time adapting in the office. I used to sit in a cubicle next to the customer support center and they were often on calls. Depending on what I was working on, I often preferred to work with complete silence. This is often possible at home but wasn't in the office unless I moved to another area. Depending on the space and distractions in your home environment, you may need to work in an office outside your home. For example, if your children are home, they may be a big distraction to your work day.

Cost Benefits

Working from home can save employees and companies a lot of money on commuting and renting office space. Companies often pay for teleworkers' equipment, Internet, and phone bills. However, teleworkers are usually responsible for providing the office space and heating in their homes. In 2011, my company started an optional telecommute program which many people chose. As office space was reduced at some locations, most teams continued to work from home. If you wanted to go into the office, there were still a few cubicles available to use.

According to Global Workplace Analytics and the Telework Research Network, "The Congressional Budget Office's estimate of the entire five-year cost of implementing telework throughout government ($30 million) is less than a third of the cost of lost productivity from a single day shut down of federal offices in Washington, DC, due to snow ($100 million)." A business could save "$11,000 per person per year" and teleworkers could save "between $2,000 and $7,000 a year" (*www.globalworkplaceanalytics.com/telecommuting-statistics*).

Being a teleworker has many benefits for you and your company especially when you consider the money that you could both save. It may take some adapting to become a teleworker. There are challenges to solve and you might need to learn to socialize in different ways. It might take a while to equalize your work-life balance. Some days it might be hard to stay productive and avoid distractions. Since I've had the privilege of working from home and in an office, I prefer to work from home. However, I would find it hard to go back to commuting to the office on a full-time basis again.

SERENA BECK (Serenabeck.com) *has been a technical writer for 10 years at Haemonetics Corporation, a blood management solutions company. In 2012, she received her CPTC. She lives in Victoria, BC, Canada, with her husband and two children. She enjoys traveling with her family and writing magazine articles.*

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Why Join a Chapter?

BY BEN WOEL | *Senior Member*

I'VE STATED MANY TIMES that I believe that the communities are the heart and soul of STC. For many members, communities are the face of STC and where they will find the most meaningful interaction. Geographic communities (chapters) are where members engage one another, learn from one another, and sharpen their skills. (Many chapters are also finding ways to serve a more geographically diverse membership by providing virtual meetings and webinars.)

We're in our annual membership renewal period. Depending on your membership type, there may be an additional fee to belong to a geographic community and some of you may wonder whether chapter membership is worthwhile. I asked the Rochester chapter council members what they found to be of the most value. The key theme for all of us was *opportunity*.

Here are some of the *opportunities* you may receive from joining and participating actively in a chapter:

1. *Networking face-to-face* with like-minded intelligent individuals who are committed to a wide range of technical communications activities.
2. *Receiving recognition* for your company, department, and yourself by entering local tech pubs competitions and receiving feedback from your peers.
3. *Volunteering* as a publications judge and helping others improve their craft.
4. *Helping an organization* reinvent itself to keep pace with a changing profession and society.
5. *Mentoring* others and helping them advance in the profession.
6. *Participating* in local and regional conferences and events.
7. *Developing* leadership skills by serving on council and committees.
8. *Building* self-confidence and credibility.
9. *Improving* yourself by learning new technical skills to apply to your job.
10. *Staying informed* about available employment opportunities and hiring entities in your geographic area.
11. *Belonging* to a respected group of dedicated diverse professionals.
12. *Forging friendships* with a great group of people who face similar challenges.

Choose membership in a chapter. They're led by dedicated people who are striving to provide services to their members. More importantly, participate actively by attending chapter functions and working as a volunteer. That's where you'll receive and provide the most value.

BEN WOELK *is an STC Director and past president of the Rochester Chapter, a community that had an almost 80% membership renewal rate in 2011 and was recognized as Community of the Year in 2013. He's currently serving as the STC Community Affairs Committee Chair, working with a phenomenal group of volunteers whose mission is to serve the STC communities by mentoring community leaders, sharing best practices, and serving as an advocate for and liaison between the communities and the STC Board.*

Why Join a SIG?

BY LORI MEYER | *Associate Fellow*

IF YOU ARE A MEMBER of an STC geographic community (chapter), you know the many ways it can enhance your STC membership. Many members have also come to know the value of Special Interest Groups (SIGs).

SIGs are virtual organizations that focus on a particular topic or area of endeavor in technical communication. SIGs provide access to online forums in which members can ask questions and share information. SIGs also provide educational opportunities and information, through webinars, websites, blogs, and social media.

Joining a SIG provides many opportunities to support your professional development and enrich your STC membership. Examples include:

- Expanding your skill set in one or more special-interest areas, which provides value for your employer, increases your marketability, and contributes to the technical communication profession.
- Keeping abreast of changes in your special-interest area and their impact on the profession.
- Networking and building friendships with fellow STC members who share your technical knowledge, interests, and challenges.
- Volunteering, developing your leadership skills, and receiving recognition for your contributions.
- Sharing your expertise through demonstrations, presentations, workshops, articles, and mentoring.

SIGs welcome members of all skill levels. They provide an excellent opportunity both to teach and to learn. You can build new skills, expand the skills you have, and mentor newcomers.

SIG membership links you with like-minded professionals all over the world. The small membership fee can open the door to good things for you, your career, and your profession. During this renewal period, add a SIG to your STC membership. Visit *www.stc.org/about-stc/communities/special-interest-groups* to learn about each of the STC SIGs.

LORI MEYER *is a member of eight STC Chapters and four Special Interest Groups (SIGs). An STC Associate Fellow, she is currently membership manager of the Rochester Chapter and San Diego Chapters, president of the East Bay Chapter, director-at-large of the Carolina Chapter, sponsorship chair of the Northeast Ohio Chapter, and secretary of the Washington DC-Baltimore Chapter, as well as serving on the Community Affairs Committee (CAC). Lori also is a former co-manager of the Technical Editing SIG, and volunteers for the Instructional Design and Learning and Consulting and Independent Contracting SIGs.*

Intercom Editorial Calendar for 2015

THE FOLLOWING TABLE provides a quick guide to the themes and deadlines for *Intercom* articles in 2015. Thanks are due to the *Intercom* Editorial Advisory Panel for their advice and suggestions on these themes. See something of interest that aligns with your area of expertise? Consider submitting an article to the editor, Liz Pohland, via email at *liz.pohland@stc.org*.

Intercom Issue	Submission due date	Description	Keywords and Writing Prompts
January 2015	11/1/2014	Technical Communication and Professional Writing	writing in the workplace, translation, writing primer/basics, plain language, writing jobs and essential writing skills
February 2015	12/1/2014	Repackaging, Rebranding, and Reinventing Technical Communication	reinventing ourselves beyond technical writing, industry skills for growth, do "technical communication" jobs really exist in industry? What jobs do technical communication skills align with?
March 2015	1/1/2015	Megatrends, Trending Now	big data, analytics, machine translation, cloud computing, natural language processing, internet of things
April 2015	2/1/2015	Learning Ecosystems	academic and professional learning, instructional design, gamification, elearning, new types of learning models, what learning does a TC student need to succeed in industry?
May 2015	3/1/2015	Facets of the Profession	core TC skills, editing, regulatory writing, standards, core areas of study
June 2015	4/1/2015	The Power Issue: Gaining Organizational Influence as a Technical Communicator	personal career management, organizational power, soft skills, resource allocation, the value of memberships and volunteering, leadership, culture change, succession, peer-to-peer relationships
July/August 2015	5/1/2015	Content Primer: Curation Is Not Just for Museums	managing content, silos, organizational content, different roles of technical communicators, metadata and categorization, the "nitty gritty" of content design, repurpose and reuse
September 2015	7/1/2015	Change Happens: Are We Ready?	change management, leadership, transition, culture change, succession, how jobs change, people change, cultures change, tools change
October 2015	8/1/2015	The Social Issue: Building Networks and Social Business Strategies	how are companies delivering content through social media, community-driven content, new roles for TCers, volunteering and mentoring via social activities, how social activities advance your business, social marketing
November/ December 2015	9/1/2015	State of the Industry	bellwethers of the profession, state of the discipline, related fields (usability, medical, information architecture, usability and UX, information development)

Understanding Content Marketing and Driving Profitable Customer Action with Content: An Interview with Joe Pulizzi

BY SCOTT ABEL | *Senior Member*

BRANDS AROUND THE globe are looking for ways to attract prospects and retain customers with content. Technical communication can—and should be—part of the mix. Scott Abel, The Content Wrangler, interviews content marketing evangelist and Founder of the Content Marketing Institute (CMI), Joe Pulizzi, about the discipline of content marketing and how consumers view and use product content.

Scott Abel: There's a lot of talk amongst content professionals today about the emerging discipline of content marketing. What is content marketing, anyway?

Joe Pulizzi: As a discipline, content marketing is an enterprise approach for creating valuable, compelling, and relevant content on a consistent basis to a very distinct target audience, with a goal of creating a profitable action or behavior. Why is content marketing so critical? Simply because our customers have every right to ignore our product and service messaging. They can ignore our ads and our PR. So how do we cut through the clutter? By delivering amazing value and experiences (like a media company does). Look at what Red Bull is doing building out a media platform. Or Jyske Bank out of Denmark, building a state of the art video production studio and creating an amazingly engaged audience. Or John Deere's *The Furrow* magazine, now the largest media platform in the farming industry. They've been delivering that magazine since 1895 and it now goes to 1.5 million farmers in 40 countries in 14 different languages.

We have to be interesting today to get attention. To get attention, we need to deliver consistently. Our marketing can't just talk about us, it has to provide ongoing value and be useful.

Scott: So, content marketing is a technique designed to drive profitable customer action. But can the approach be used by people who create other types of content? For instance, can you think of ways that content marketing tactics could be used by technical communication professionals to attract and acquire a clearly-defined audience?

Joe: Most times, marketers think of content marketing as just attracting new customers. That's true, but content marketing can be used to attract new employees, to garner donations, and to keep current customers happier and buying more.

For technical communication professionals, it's all about focusing on what the overall goal is AND what the needs of the audience are. A good example is Indium Corporation. Indium manufactures industrial soldering equipment. In order to get more buyers thinking about Indium, and also to present their engineers as experts, they developed a consistent blog where 17 engineers now blog on a regular basis. Within 18 months they had a 600% increase in qualified leads. Also, just type any kind of soldering question into Google. You'll most likely get an Indium engineer with an answer. Yes, most of the content is text, but they also integrate video examples, slide presentations, and white papers into the mix. They had the brilliant idea of targeting engineers as the audience with content coming directly from engineers.

Scott: There's a lot of confusion about the difference between content marketing and content strategy. Can you help us understand the difference?

Joe: Content marketing is using content as an asset specifically for marketing purposes. Content strategy is bigger and focuses on how content can be used as an asset enterprise wide. CMI's chief strategist Robert Rose wrote an excellent article on this difference (*http://contentmarketinginstitute.com/2013/10/content-strategy-content-marketing-separate-connected/*).

Scott: How do we know that people prefer the types of content produced by content marketers as opposed to the traditional advertising and sales materials we have always produced? Is there research to prove any of this?

Joe: What do you do when you have a problem? Do you go to find that solution in a search engine? Do you ask your colleagues on social media? Do you look to your industry's trade magazine or media site? When we have a problem, we look for content.

According to Forrester (and many others),

In the digital age, change happens quickly. This column features interviews with the movers and shakers—the folks behind new ideas, standards, methods, products, and amazing technologies that are changing the way we live and interact in our modern world. Got questions, suggestions, or feedback? Email them to *scottabel@mac.com*.

we know that the majority of the buying process is over before a buyer ever contacts us. What are they doing? They are getting their own answers. If we, as companies, aren't the providers of the information that answers their questions, we will most likely be left out of the buying/decision-making process.

According to Roper Public Affairs, 80% of buyers prefer to get company information in a series of articles versus an advertisement. Who wouldn't? 70% say that content from the company makes them feel closer to that company, and 60% say that company content helps them make better product decisions. But stats aside, I always follow the money. Large enterprises wouldn't be putting marketing dollars behind content marketing if it wasn't working, and now approximately 25% of the marketing budget goes toward content creation and distribution.

Scott: Can you share with us some of the best content marketing examples you have found? Ideally, we'd like to see some big brands (maybe some video campaigns), some innovative social campaigns, or others types of content that serve as great examples, and if possible, some examples of folks providing "how to" (or instructional content) to their audience.

Joe: I love what LEGO has done with their LEGO magazine concept (since 1987) and, of course, the LEGO movie. Red Bull just launched their own TV channel on Apple TV. Chipotle just launched their own comedy series called "Farmed and Dangerous." IBM's C-Level research reports are some of the best in the industry. Hubspot practically owes all their massive success to their amazing blog and eBook program. If that's not enough, here are 100 other examples for you to chew on (*http://contentmarketinginstitute.com/education/ultimate-ebook-100-content-marketing-examples/*).

Scott: What is the Content Marketing Institute (CMI) and what types of resources do you provide folks who are looking to learn about content marketing?

Joe: CMI is dedicated to helping marketers own their own media channels and developing loyal audiences to turn them into customers that actually buy things from you. We do this through our events (like Content Marketing World), our magazine (*Chief Content Officer*), and our daily content and email newsletter on the CMI site. It will be helpful to both beginners and advanced marketers to get more from their content creation and distribution practices.

Scott: What are the biggest mistakes people make when they start thinking about content marketing and how can we avoid them?

Joe: The biggest mistake is inconsistency. Most content marketing fails because it either stops or doesn't deliver or publish in a consistent manner.

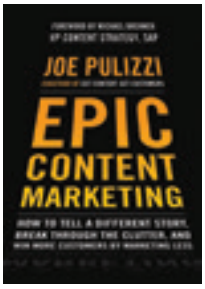
Another mistake is selling in the content. Be sure to keep your sales out of the content itself. Readers see a sales pitch a mile away.

Your content needs to fill a need. It must be truly useful and entertaining. Remember, you are competing with all the other content surrounding your customers, so it must be best of breed.

Scott: You wrote a book called *Epic Content Marketing*. What do you mean by "epic" and can you provide a few examples?

Joe: *Epic Content Marketing* has six tenets: consistency, filling a specific need to a specific audience, informing with human language (not corporate speak), a point-of-view, sales removed from the content, and a goal of best of breed (meaning we need to set the goal of being the leading informational provider for the particular niche you are serving).

Scott: Technical communicators have been on the forefront of innovations in digital publishing. In fact, we have pioneered the single-source, multi-channel publishing space and



have lead the way in the development of advanced information creation, management and delivery practices, and standards. It makes sense that marketers would want to adopt our intelligent content approaches so they can benefit from producing top quality content efficiently and effectively. Do you see any interest amongst marketers in adopting more advanced content management and creation tools?

Joe: So many marketers are using content marketing for a single purpose use. This is simply a waste of an asset (the content). It's imperative that we set up a repeatable process for our content. Just think if you were a chef that had to recreate a recipe every time. That is where we are at with content marketing. We need our content to be intelligent: one content source, combined with a clear process, that leads to multiple deliverables that can adapt depending on the audience's needs. This is the reason why CMI recently purchased the Intelligent Content Conference. We need to lead more marketers to looking at their content as an asset that can be leveraged throughout the organization for multiple purposes and objectives.

Scott: What are the best resources for learning more about content marketing?

Joe: First check out *ContentMarketing Institute.com* for all our content and research on the industry. For events, Content Marketing World is the largest international event for content marketing, held this year in Cleveland, OH (8–11 September). Also check out Intelligent Content Conference, which will be held in San Francisco, CA, in March 2015. We have an online training program that can help your marketing staff get "up to snuff" with the practice. Great books include Robert Rose's *Managing Content Marketing* and *The Language of Content Strategy* by Rahel Anne Bailie and Scott Abel.

Listening to Student Teams

BY THOMAS BARKER | *Fellow*

COLLABORATIVE STUDENT TEAMS are a challenge to teachers who want to teach using projects instead of traditional assignments. These teachers seek to engage their students in the workplace situations they will encounter after they graduate. Students like projects and they like collaborating because they can engage with fellow students and feel connected to their futures.

Student teams can engage their students in a number of ways. In service-learning projects, students take on volunteer work, otherwise students can find clients in the university or business community and do writing projects for them. Whatever model a teacher chooses, putting students on collaborative teams fits right in as a technique.

But teaching with student teams, sometimes called "group assignments," has its built-in downfalls. For one, weaker students may not engage at all, while stronger students take on all the challenges. Teamwork also presents grading or marking problems. The team may do a great job, but some members bear the brunt of the work. I've had team assignments where one or two talented and selfless students compiled all the content and burned the midnight oil while their mates were busy studying for exams in other courses. And, in the end, figuring out who did (or didn't do) the work is problematic, and if you're not careful, someone gets a free ride while others get pulled down.

What Makes Student Teams Work?

To find out what makes student teams work, I started an academic conversation with some of my colleagues who use student teams routinely. What I found was that if you know something about how to get teams started, how to support them along the way and assess them effectively, then there's a better chance that these problems will sort themselves out. With these tips, along with some insights from research into student teams, you can turn ordinary student team assignments into awesome team performances.

Getting Student Teams Started

A key element in successful student teams, says Terri Frederick at Eastern Illinois University, is not to define the "problem" too clearly. This sounds counterintuitive, but the conversations and interactions students have about the problem can often lead to a greater bonding experience. Terri should know because she's studied student teams and explored how the sequences of their conversations reveal how they build consensus when faced with challenges from their clients and each other.

While an open-ended approach works to help students define problems, giving them the grading criteria and expected learning outcomes at the beginning helps them get started. Kim Sydow Campbell, from The University of Alabama, uses this approach. So does LeeAnne Kryder from the University of California at Santa Barbara. She distributes the evaluation form and encourages students to reflect on it in a follow-up memo.

Another great way to get students engaged in problem-solving conversations for reports is to ask them to formalize their conversations into proposals. These proposals, says Tim Giles at Georgia Southern University, bring out the students' competitive natures. He posts their proposals on a forum and asks students to pick the best ones. The winners of this competition also become the leaders of their teams.

I asked Kathy Northcut from Missouri University of Science and Technology how she approaches team assignments. Kathy says the trick to getting students started on the right

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path is to make sure they understand that their team projects have a point and aren't just menial or redundant. They can seem that way if the students, such as those in engineering disciplines, are involved in high-stakes projects like automobile design challenges. Students can get lost when they try to transfer skills from these projects to poster design or report writing projects.

For the instructor who wants to go in-depth in preparing students, Stephanie Vie at the University of Central Florida suggests spending several days having conversations with students about what makes effective teams and common issues that emerge. How can students identify "hitchhikers" or "couch potatoes" on their teams? How can they set clear ground rules? She then asks students to take a Myers-Briggs Personality Type Inventory (MBTI) (available unofficially online at *www.humanmetrics.com*). Students follow up by using MBTI categories in their reflective writing about their teamwork. Stephanie has a number of exercises she uses to follow up with students using the MBTI inventory. You can email her at *Stephanie.Vie@ucf.edu* to request copies.

This column focuses on a broad range of practical academic issues from teaching and training to professional concerns, research, and technologies of interest to teachers, students, and researchers. Please send comments and suggestions to *ttbarker@ualberta.ca* or the column blog at *http://theacademicconversation.ning.com/*.

Supporting Students Along the Way

Once students have their projects rolling, it's important to intervene effectively. This can be a combination of listening to their team interactions and monitoring their work through progress reports. Student conversation over an editing task, for example, can tell a teacher whether they are seriously structuring their work around the task at hand, or chatting about what they will do over the weekend. Terri Frederick identifies potentially problematic conversational patterns in their team interactions and tries to distinguish between them and social chat that sets the stage for real work. "I often will watch for the lull in the chit-chat where turning to their work fills an awkward moment in the group session. I've also found that allowing student groups to see other groups at work can set the performance bar a little higher."

In situations where students are doing larger, out-of-class work projects, the formal progress or status report can help support work. LeeAnne Kryder at the University of California at Santa Barbara uses status reports to learn about problems the team is having and where intervention might be needed. Jim Henry at University of Hawai'i at Mānoa uses a more formal progress report assignment that includes a project description, scope, work completed (with problems), and a revised or projected work schedule. What's more, students use their progress report to debrief the class in a mid-project assessment presentation.

Assessing Student Teams

Progress reports provide useful information that also feeds into final project evaluations. Earlier we looked at some of the pitfalls of evaluating student teams. Some instructors give the students the evaluation criteria at the beginning of the project so they can see the expectations, but it's the end-of-project evaluations that can be problematic.

While they can at times be inflated, end-of-project self-evaluations and peer evaluations are standard methods of telling who contributed what to a project. What Terri Frederick suggests is that students should also reflect on the strategies they used to make the project work. These evaluations should address a broad range of behaviors and collaborative skills like listening and conflict management. This broader evaluation encourages students to see the project not just as something that produced a document, but also as a process that taught them valuable workplace negotiation and time management skills.

Successful student teams, suggests Terri, are not just those based on models of collaboration in the workplace. Students need to focus on specific skills, often derived through their freedom to interact with one another, that they can later apply to whatever workplace situations they encounter. Imitating professional work teams only goes so far and may take the focus away from the students' own strategies.

Researching Student Teams

Understanding student strategies can lead to productive team experiences, but researching the internal dynamics of student teams can also lead teachers to a better understanding of how their own teams work. One way to approach student teams focuses on the mechanics of engagement and the good feelings students need to have to function well in teams. Turns out there are at least two dynamics at work: *engagement* and *relatedness*. Engagement we're familiar with: students put out effort, they show enthusiasm, and they invest in learning. Relatedness is most important though, as it connects to learning outcomes.

Relatedness is not quite the same as engagement. It refers to a student's sense of connectedness and belonging. How related do students feel with their classmates or their teacher? How does this factor affect success in student teams? Researchers at a secondary school in China asked these questions and their answers are both expected and surprising.

In a 2014 study published by the Association for Computing Machinery, researchers surveyed students who used a Wiki to collaborate to measure whether their engagement correlated with their sense of relatedness or with their sense of connectedness to fellow students and teachers. They found that, sure enough, the more students felt related to one another, the more they engaged in their student teams. But what is surprising is that the sense of *relatedness to the teacher* correlated even more strongly with student effort, their enthusiasm, and their investment in learning. While we may see students as focused on one another more than their teacher, it turns out, according to these researchers, that their relatedness to the teacher counts more.

Listening and Learning from Student Teams

The thread that runs through stories of successful student teams is that teachers listen to their students. They listen as the students define the problems and negotiate their roles, when they are challenged by unexpected client or workplace demands, and when they talk about their own collaborative strategies. Finally, they listen as students report on how related they felt to their peers and their teachers. So if you're planning a student team assignment this term, consider giving your students the space to perform and then listen for their success.

RESOURCES

Frederick, Terri A. 2008. "Facilitating Better Teamwork: Analyzing the Challenges and Strategies of Classroom-Based Collaboration," *Selected Works. http://works.bepress.com/terri_fredrick/4/.*

Journal of Student Centered Learning, Centre for the Advancement of Teaching (CAT), Xavier University of Louisiana. *http://cat.xula.edu/journals/.*

Oakley, Barbara, et al. 2004. "Turning Student Groups in to Effective Teams," *www4.ncsu.edu/unity/lockers/users/f/felder/public/Papers/Oakley-paper (JSCL).pdf.*

Mark Your Calendar

Organization Events Across the Globe

F.Y.I. lists information about nonprofit ventures only. Please send information to *intercom@stc.org.*

1 8–11 Oct
The **American Medical Writers Association (AMWA)** will hold its 74th annual conference, with a theme of "Shake, Rattle, and Write," at the Memphis Cook Convention Center in Memphis, TN. For more information, contact:
AMWA
+1 (301) 294-5303
amwa@amwa.org
www.amwa.org/events_annual_conference

2 12–14 Oct
The **Public Relations Society of America (PRSA)** hosts their international conference, "Leading the Way: A Fearless Future for PR," at the Washington Marriott Wardman Park Hotel in Washington, DC. For more information, contact:
PRSA
+1 (800) 350-0111
www.prsa.org/Conferences/InternationalConference/

3 13–15 Oct
The **IEEE Professional Communication Society (PCS)** hosts IPCC2014, Meeting Grounds: Lifelong Learning, from Classroom to Workplace, at Carnegie Mellon University in Pittsburgh, PA. For more information, contact:
IEEE PCS
http://pcs.ieee.org/ipcc2014/

4 27–31 Oct
The **Human Factors and Ergonomics Society (HFES)** will hold its 2014 international annual meeting at the Hyatt Regency Chicago in Chicago, IL. For more information, contact:
HFES
+1 (310) 394-1811
info@hfes.org
www.hfes.org/web/hfesmeetings/2014annual-meeting.html

5 31 Oct–4 Nov
The **American Society for Information Science and Technology (ASIS&T)** will hold its Annual Meeting, with a theme of "Connecting Collections, Cultures, and Communities," at the Sheraton Seattle Hotel, Seattle, WA. For more information, contact:
ASIS&T
asis@asis.org
www.asis.org/asist2014/

6 5–8 Nov
The **American Translators Association (ATA)** will hold its 55th annual conference at the Sheraton Chicago in Chicago, IL. For more information, contact:
ATA
+1 (703) 683-6100
ata@atanet.org
www.atanet.org/conf/2014

7 5–6 Dec
The **India Chapter of STC** will hold its 15th annual conference at the Vivanta by Taj hotel in Bangalore, India. For more information, contact:
STC India
www.stc-india.org/

8 26–29 Jan 2015
The **Annual Reliability and Maintainability Symposium (RAMS)** 2015 will be held at Innisbrook Golf and Spa Resort in Palm Harbor, FL. This year's theme is "Unleashing R&M Knowledge." For more information, contact:
RAMS
+1 (603) 863-2832
www.rams.org

9 12–16 Feb
The 2015 **American Association for the Advancement of Science (AAAS)** Annual Meeting will take place at the San Jose Convention Center in San Jose, CA. The theme is "Innovations, Information, and Imaging." For more information, please contact:
AAAS
+1 (202) 326-6450
meetings@aaas.org
http://meetings.aaas.org

10 24–29 Apr
The **International Society for Performance Improvement (ISPI)** will hold its Performance Improvement Conference at the Hyatt Regency in San Antonio, TX. For more information, contact:
ISPI
+1 (301) 587-8570
conference@ispi.org
www.ispi.org/AC2015

11 30 Apr–1 May
The **American Society for Indexing (ASI)** will be holding its annual conference in Seattle, WA. For more information, contact:
ASI
conference@asindexing.org
www.asindexing.org/conference-2015/

12 21–24 June
The **Society for Technical Communication** hosts the Technical Communication Summit in Columbus, OH. For more information, contact:
STC
+1 (703) 522-4114
http://summit.stc.org

* STC-related event

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BY LIZ HERMAN | *Senior Member*

IN MY VERY EARLY 20s, I left a lucrative career in millinery to become a technical communicator. It was the best decision I ever made. Wait, that doesn't sound right. I was never a milliner, although I do like to talk about the different hats we wear as technical communicators. My technical communication jobs have been no different and I have worn many different hats and served in many different roles. Let me start over.

In my very early 20s, I knew more about health insurance for people over the age of 65 than I knew about my own personal policy. I also knew a lot about defaulted federal student loans, but perhaps not in the way that you may think. I trace my career back to what I consider to be my first real technical communication job, which was writing letters on behalf of the U.S. Department of Education to students who had defaulted on their school loans. My technical communication career had begun. I remember around that time being featured in a University of Iowa alumni magazine article titled "Dubuque [IA] Native Falls into Technical Writing." That's how it happens for most of us, I suppose. We fall into what becomes our careers.

I moved on from that job to work for another government contractor, but this time it was in the area of healthcare and, specifically, Medicare. I taught providers how to submit Medicare claims for reimbursement, created training materials, wrote support manuals, and maintained a website for our customers. I didn't know then that the healthcare industry, along with technical communication, would be a common factor in all of my jobs going forward.

Today I work for Battelle out of its Arlington, VA, office where I support our health and analytics division doing business development and program management. Medicare and the Centers for Medicare & Medicaid Services are still areas of focus. My technical communication skills are put to use in a variety of ways at Battelle, which I enjoy, from developing proposals to managing customer accounts where content management, quality improvement, and program management intersect in both exciting and challenging ways. In addition, I truly love transforming complex information, particularly healthcare information, into accessible business intelligence that I can share with people.

Like many technical communicators, most of my past titles do not identify me as a technical communicator. I was an information specialist, a technical trainer, an online training designer, a webmaster, a knowledge manager,

The author during a lightning talk at the 2014 STC Summit

and a director. Along the way, however, I've learned to see technical communication in all of the things I do. And I've tried to share the enthusiasm I have for the field by teaching writing courses to college students, showing people the connection between technical communication and other fields like program management, and staying active in STC. Ah, joining STC. Now that might have been the best decision I made in my very early 20s.

I've been a member of STC since 1997. I wasn't always an active member. Personal and professional responsibilities got in the way at times, like they do for most of us. Getting re-engaged at both the chapter and society levels has been rewarding. I am once again enjoying the camaraderie of people who actually like to talk about writing and communication and who have amazing perspectives and interesting things to say. It allows me additional avenues (chapter meetings, *Intercom* articles, Notebook blog posts, Summit presentations) to share what I know. Most importantly, perhaps, is that it encourages me to keep learning and I tip my hat to you, technical communicators, for that.

DR. LIZ HERMAN, *who is currently developing a hat fetish, is a long-time technical communicator and project manager with industry experience in general management, knowledge management, healthcare, information technology, and education. She is certified as a Project Management Professional through the Project Management Institute and is a Certified Professional Technical Communicator through STC. Find her on LinkedIn (*http://www.linkedin.com/in/lizhermanphd*) or on Twitter (*@dr_herman*).*

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